

TOWN OF CUMBERLAND
 TAX ASSESSOR'S OFFICE
 P.O. BOX 7
 CUMBERLAND, R.I. 02864
 TELEPHONE: 401-728-2400 ext. 113,114
 FAX: 401-475-1851

Under the provisions of an ordinance granting an Additional Tax Dollar deferment on real estate owned and occupied by persons over 65 years of age who shall file certified annual statements of income with the Assessor's Office on or before the last day on which sworn statements may legally be filed.

Date: ___/___/___

Property Owners:

Name: _____

Social Security # ___/___/___ Age ___ D.O.B. ___/___/___

Address: _____ Plat/Lot: _____ Telephone: (____) ____ - ____

Other Owners: _____ Relationship: _____

_____ Relationship: _____

_____ Relationship: _____

If Other Owner(s) is over 65 - D.O.B. ___/___/___

Is the Property Held in Trust? _____ If Yes, Please Attach a copy of the Trust.

Is the Property a Single Family Unit? _____ If Not, How many Units? _____

Tangible Proof Of Total Income Must Be Submitted At The Time Of Filing. Total Single Income Not Greater Than \$42,000 Per Year. Total Family/Household Income Not Greater Than \$50,000 From All Sources.

THIS INCLUDES:

1. FORM - SSA - 2458 FROM SOCIAL SECURITY
2. ANNUAL BANK INTEREST STATEMENTS
3. ANNUAL DIVIDEND STOCK STATEMENTS
4. ANNUAL PENSION STOCK STATEMENTS
5. ANNUAL RENT RECEIPTS
6. MISCELLANEOUS (see statement of income on page 2)

MARITAL STATUS: Single Married Widow(er) Divorced

____/____/____

Account # _____

MARITAL STATUS: Single Married Widow(er) Divorced
Other **Members** of Household _____ Relationship _____

Are you a Legal Resident of R.I.? _____ (Please attach copy of R.I. Drivers License)

Are you Registered to Vote in Cumberland? _____

Did **you or any member of your household** receive any form of monetary assistance from any Local, State, or Federal agency during this year? _____

STATEMENT OF INCOME:

Gross Social Security (His and/or Hers)	\$ _____
Retirement Pension	\$ _____
Veteran's Pension	\$ _____
Aid to the Blind	\$ _____
Aid to the Disabled	\$ _____
Unemployment compensation	\$ _____
Worker's Compensation	\$ _____
Salary or Wages Earned	\$ _____
Bank Interest	\$ _____
Stock and/or Bond Dividends	\$ _____
Insurance Dividends	\$ _____
Capital gain from sale of all properties	\$ _____
Rental or other income	\$ _____

TOTAL INCOME FROM **ALL** SOURCES: \$ _____

CERTIFICATION:

If Senior Deferment is to be maintained, I understand that I must make an application to the Assessor's Office each year **on or before March, 15** of the current tax year. I agree to revise the information annually and file a true and accurate accounting each year.

NOTE: The Town of Cumberland reserves the right to investigate all the information provided by the applicant. Any discrepancies will be considered just cause for cancellation of the application for benefits under the Senior Deferment Program.

I (We) hereby attest that I (We) have met the requirements set forth in both State and Local law and that the above information is **TRUE**. I (We) hereby attest that I (We) have read and understand the attached Ordinance No. 97-14, § 1, 5-7-97, 02-36, § 1, 12-4-02

Applicant: _____

Please Print Name _____ Signature _____

Subscribed and sworn before me this ____ day of _____

Notary Public: _____ Comm. Expires: _____

Town of Cumberland

Web-Site Copy

Date Returned

___/___/___

Account # _____

FOR ASSESSOR'S OFFICE USE ONLY:

Account #: ___ - _____ - ___

Plat/Lot: ___ - _____ - ___

Deferment Status: _____

Approval Date: ___/___/___

Assessor: _____ Original Year: ___/___/___

NOTES

TAX ASSESSOR'S OFFICE
P.O. BOX 7
CUMBERLAND, R.I. 02864
Telephone: 401-728-2400 ext. 113,114
Fax: 401-475-4851

THIS LIEN MUST BE FILED IN THE CUMBERLAND TOWN CLERK'S OFFICE

STATEMENT OF ENTRY INTO TAX DEFERRAL PROGRAM
In accordance with Ordinance No. 02-36, § 1, 12-4-02

PLAT _____ LOT _____ LOCATION _____

The Town of Cumberland hereby state that on the _____ day of _____,
it entered into a Tax Increase Deferral Program Agreement with:

Owners of the real property described above choose to defer taxes on said property for the _____ tax year. This lien is due upon either of the following: the property is disposed of by reason of transfer, conveyance or any of the applicant(s) interest by reason of death of the applicant(s), and all taxes so deferred to date shall become due and payable immediately.

_____ Tax Amount Deferred \$ _____

Signature of applicants

Tax Assessor / Finance Director Town of Cumberland

Notary Public
My commission expires _____

RECEIVED

AUG 03 2011

11-12

TOWN OF CUMBERLAND

SOLICITOR'S OFFICE

AN ORDINANCE: RELATING TO THE SENIOR CITIZEN TAX DEFERMENT PROGRAM

The Town of Cumberland ordains:

Section 1. Secs. 36-162, 36-163 and 36-165 in Article IX of Chapter 36 of the Town of Cumberland Code of Ordinances entitled "Senior Citizens Tax Deferment Program" are hereby amended to read as follows:

Sec. 36-162. Definitions. The following words, terms and phrases, when used in this Article, shall have the meanings ascribed to in this section.

Adjusted Gross Income (AGI) is that income reported to the Internal Revenue Service as adjusted gross income (AGI) for income tax purposes.

Primary Residence shall mean a developed parcel of real estate consisting of a single family residential dwelling used as a primary residence.

Senior Citizen shall mean a Cumberland resident who is ~~sixty-six (66)~~ sixty five (65) years of age or older.

Sec. 36-163. Eligibility. A person is eligible for the Senior Citizen Tax Deferment Program if that person is:

- (1) A senior citizen.
- (2) Total household earnings for the year is below ~~\$28,000.00~~ \$42,000.00 for a single senior citizen or ~~\$33,000.00~~ \$50,000.00 for the household.
- (3) Owns a primary residence and no other real estate.

Sec. 36-165. Deferment.

- (a) A qualified senior citizen shall be granted on an annual basis the deferment of any tax increase for the year not to exceed 3.5% per annum.
- (b) The collection of those taxes so deferred shall be deferred until the sale of the primary residence by the qualified senior or upon his/her death. Simple interest at the rate of 2% per year on the taxes deferred will be payable upon such sale or death.

1 (c) A lien or similar certificate shall be filed in the land evidence records
2 indicating that the primary residence of the qualified senior is in the deferred
3 tax programs. The office of the Tax Collector shall maintain an annual list of
4 qualified seniors/properties and the amounts due thereon
5

6 Section 2. This ordinance shall take effect upon passage.
7
8

9 -----
10 EXPLANATION
11

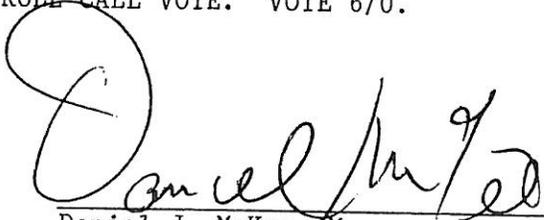
12 This ordinance would amend the age and income requirements for inclusion in the
13 senior citizen tax deferral program and provide for the imposition of simple interest at
14 the rate of two (2%) percent per year on the taxes deferred to be paid upon the sale of the
15 property or death of the owner.
16

17
18
19 08/03/2011
20 solicitor/th:

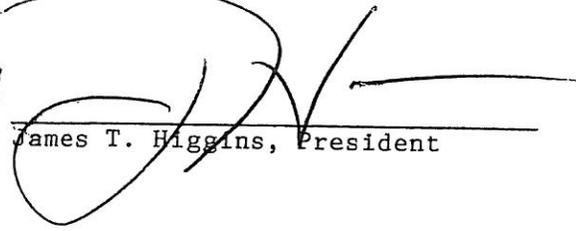
21 ordinances:11-Senior Citizen Tax Deferral Program amended
22
23

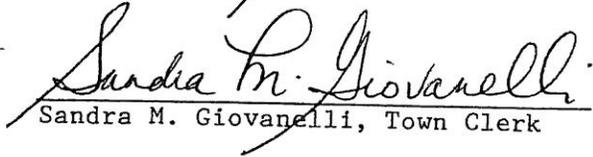
ON A MOTION MADE BY COUNCILOR DWYER AND SECONDED BY COUNCILOR WILK IT IS
UNANIMOUSLY VOTED TO APPROVE BY A ROLL CALL VOTE. VOTE 6/0.

Date Adopted: September 21, 2011


Daniel J. McKee, Mayor

A True Copy, ATTEST:


James T. Higgins, President


Sandra M. Giovanelli, Town Clerk